

WEST 1.0

Help

Main Menu | Search Form | Posting Counts | Show WS Numbers | Edit WS Numbers

Search Results - 0

Term	Documents
((stochastic ADJ market ADJ factor\$) AND portfolio\$)	0

Database: Derwent

Refine Search: (stochastic ADJ market ADJ factor\$) AND portfolio\$

Search History

DB Name	Query	Hit Count	Set Name
DWPI	cumulative NEAR3 (distribution ADJ function)	17	<u>L1</u>
DWPI	(cumulative NEAR3 (distribution ADJ function\$)) AND portfolio\$	0	<u>L2</u>
DWPI	(low ADJ discrepancy ADJ deterministic ADJ sequence\$) AND portfolio\$	0	<u>L3</u>
DWPI	(stochastic ADJ market ADJ factor\$) AND portfolio\$	0	<u>L4</u>

5/10/99

SMD

Your recent searches

This is a list of your 11 most recent searches this session.

Click an item in the **Search** column to view its search results, or go back to [Search by Word](#).

Search	Articles found
(cumulative PRE/1 distribution PRE/1 function) AND portfolio AND stochastic	9
(cumulative PRE/1 distribution PRE/1 function) AND portfolio AND stochastic	5
(cumulative PRE/1 distribution PRE/1 function)	50
(cumulative PRE/1 distribution PRE/1 function)	25
(AUTHOR(traub) OR AUTHOR(paskov) OR AUTHOR(vanderhoof) OR AUTHOR(papageorgiou)) AND portfolio?	1
(AUTHOR(traub) OR AUTHOR(paskov) OR AUTHOR(vanderhoof) OR AUTHOR(papageorgiou)) AND portfolio?	4
AUTHOR(traub) OR AUTHOR(paskov) OR AUTHOR(vanderhoof) OR AUTHOR(papageorgiou)	50
AUTHOR(traub) OR AUTHOR(paskov) OR AUTHOR(vanderhoof) OR AUTHOR(papageorgiou)	50
stochastic AND portfolio AND (distribution PRE/1 function) AND (low PRE/1 discrepancy PRE/1 deterministic PRE/1 sequence)	0
stochastic AND portfolio AND (distribution PRE/1 function) AND (low PRE/1 discrepancy PRE/1 deterministic PRE/1 sequence)	0
stochastic AND portfolio AND (distribution PRE/1 function)	12

APS

(FILE 'USPAT' ENTERED AT 14:00:51 ON 10 MAY 1999)

L1 23 S LOAN? (P) PORTFOLIO?
L2 6 S L1 AND HORIZON?
L3 0 S PORTFOLIO? AND LOAN? AND HORIZON? AND DISTRIBUTION() FUNC
TIO
L4 6 S PORTFOLIO? AND LOAN? AND CORRELATION?
L5 6 S L4 NOT L2
L6 24 S AREA? (BN) (DISTRIBUTION() FUNCTION?)
L7 0 S L6 AND (LOAN OR PORTFOLIO?)
L8 0 S POTENTIAL-LOSS-FUNCTION? AND PORTFOLIO?
L9 1 S POTENTIAL-LOSS-FUNCTION?
L10 104 S CUMULATIVE-DISTRIBUTION-FUNCTION?
L11 0 S L10 AND PORTFOLIO?
L12 6 S LOW-DISCREPANCY
L13 0 S LOW-DISCREPANCY-DETERMINISTIC-SEQUENCE?
L14 9 S VALUE-AT-RISK AND PORTFOLIO?
L15 0 S L14 AND LOSS-FUNCTION?

SMD

Dialog 5/10/99

? b411

```
10may99 16:34:18 User242928 Session D33.2
$0.00    0.041 DialUnits File410
$0.00  Estimated cost File410
      FTSNET  0.002 Hrs.
$0.00  Estimated cost this search
$0.00  Estimated total session cost  0.154 DialUnits
File 411:DIALINDEX(R)
```

DIALINDEX(R)

(c) 1999 The Dialog Corporation plc

```
*** DIALINDEX search results display in an abbreviated ***
*** format unless you enter the SET DETAIL ON command. ***
? sf mathsci
```

```
>>>"MATHSCI" is not a valid Dialindex category
>>>No valid files specified
```

? b mathsci

```
>>>"MATHSCI" is not a valid category or service name
>>>No valid files specified
```

DIALINDEX(R)

(c) 1999 The Dialog Corporation plc

```
*** DIALINDEX search results display in an abbreviated ***
*** format unless you enter the SET DETAIL ON command. ***
? b 411
```

```
10may99 16:35:10 User242928 Session D33.3
$0.18    0.143 DialUnits File411
$0.18  Estimated cost File411
      FTSNET  0.014 Hrs.
$0.18  Estimated cost this search
$0.18  Estimated total session cost  0.297 DialUnits
File 411:DIALINDEX(R)
```

DIALINDEX(R)

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```
*** DIALINDEX search results display in an abbreviated ***
*** format unless you enter the SET DETAIL ON command. ***
? sf allbus
```

```
You have 342 files in your file list.
(To see banners, use SHOW FILES command)
? s (au=traub or au=paskov or au=vanderhoof or au=papageorgiou) and portfolio?
```

Your SELECT statement is:

```
s (au=traub or au=paskov or au=vanderhoof or au=papageorgiou) and
portfolio?
```

Items	File
-----	-----
Examined	50 files

SMD

1 20 Finance & Banking Newsletters 09/May 07
Examined 100 files
Examined 150 files
Examined 200 files
Examined 250 files
Examined 300 files

1 file has one or more items; file list includes 342 files.
One or more terms were invalid in 162 files.

? b 267

```
10may99 16:41:00 User242928 Session D33.4
    $4.42      3.533 DialUnits File411
$4.42 Estimated cost File411
    FTSNET   0.100 Hrs.
$4.42 Estimated cost this search
$4.60 Estimated total session cost  3.830 DialUnits
```

File 267:Finance & Banking Newsletters 1999/May 07
(c) 1999 The Dialog Corp.

Set	Items	Description
---	----	-----

? s (au=traub or au=paskov or au=vanderhoof or au=papageorgiou) and portfolio?

1	AU=TRAUB
0	AU=PASKOV
0	AU=VANDERHOOF
0	AU=PAPAGEORGIOU
5844	PORTFOLIO?
S1	1 (AU=TRAUB OR AU=PASKOV OR AU=VANDERHOOF OR AU=PAPAGEORGIOU) AND PORTFOLIO?

? t 1/3,k/1

1/3,K/1
DIALOG(R) File 267:Finance & Banking Newsletters
(c) 1999 The Dialog Corp. All rts. reserv.

04542897

The Art Of Tax Management: By considering the tax implications of owning mutual funds, you will more effectively manage your clients' investments.

Daniel J. **Traub**

Financial Planning

December 1,1998 DOCUMENT TYPE: NEWSLETTER

PUBLISHER: SECURITIES DATA PUBLISHING

LANGUAGE: ENGLISH WORD COUNT: 1841 RECORD TYPE: FULLTEXT

(c) SECURITIES DATA PUBLISHING All Rts. Reserv.

Daniel J. **Traub**

...years. Over that time, this fund has grown to become a larger percentage of their **portfolio** than is prudent. The capital gains and resulting taxes the client would owe upon a sale make you reluctant to reposition the **portfolio**. If you do nothing, the problem will likely become even more extreme over time. What...

TEXT:

...years. Over that time, this fund has grown to become a larger percentage of their **portfolio** than is prudent. The capital gains and resulting taxes the client would owe upon a sale make you reluctant to reposition the **portfolio**. If you do nothing, the problem will likely become even more extreme over time. What...reinvest it, and there is certainly no

requirement to do so.

Reinvesting distributions for a **portfolio** holding that is already too large will only compound the problem. Simply inform the mutual...

...the lowest cost-basis shares of a fund that is overweighted will help solve the **portfolio** dilemma as well.

You should be aware of a few intricacies regarding the gifting of...

...Offset winners with losers. Perhaps the most common technique for the tax management of a **portfolio**, either stocks or mutual funds, is to sell a losing position in order to offset...sale.)

Now, here are some considerations for funds you may want to add to a **portfolio**. Whereas the above discusses how to deal with a fund if it is already part of a **portfolio**, the following are factors you should consider for additions to a **portfolio**. Although tax considerations will not yield any advice on what type of fund to purchase...

...funds need only distribute realized gains (as opposed to unrealized gains).

If a fund has **portfolio** turnover of 100%, then the average holding period for each investment is one year. A...

...turnover has a two-year average holding period, and so on. Funds with a higher **portfolio** turnover will usually, but not always, have year-end distributions that are higher than funds with lower **portfolio** turnover. In addition, high-turnover funds are more likely to distribute more in the form...

...nothing about the likelihood of those gains being realized.

Any fund that has historically low **portfolio** turnover, and whose turnover is expected to remain that way, should have no reason to...to minimize the tax consequences.) In essence, past tax efficiency may make an older, low **portfolio** turnover fund less attractive to potential new investors; only time will tell.

* Don't buy...

...your clients' taxes and increase their after-tax return while allowing you to rebalance their **portfolio** over time. Along the way, you will create clients who are more satisfied with the...

? b 411

```
10may99 16:41:38 User242928 Session D33.5
$1.06    0.193 DialUnits File267
        $1.25  1 Type(s) in Format  3
        $1.25  1 Types
$2.31  Estimated cost File267
        FTSNET  0.016 Hrs.
$2.31  Estimated cost this search
$6.91  Estimated total session cost   4.022 DialUnits
File 411:DIALINDEX(R)
```

DIALINDEX(R)

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*** DIALINDEX search results display in an abbreviated ***
*** format unless you enter the SET DETAIL ON command. ***

? sf allbus

You have 342 files in your file list.

(To see banners, use SHOW FILES command)

? s portfolio? and (cumulative (3n) (distribution()function?))

Your SELECT statement is:

s portfolio? and (cumulative (3n) (distribution()function?))

Items	File
1	7: Social SciSearch(R)_1972-1999/May W1
7	13: BAMP_1999/May W1

<-----User Break----->

u!

? s portfolio? and (cumulative (3n) (distribution()function?)) and
stochastic? and (low()discrepancy()deterministic()sequence?)

Your SELECT statement is:

s portfolio? and (cumulative (3n) (distribution()function?)) and
stochastic? and (low()discrepancy()deterministic()sequence?)

Items	File
Examined	50 files
Examined	100 files
Examined	150 files
Examined	200 files
Examined	250 files
Examined	300 files

No files have one or more items; file list includes 342 files.

? s portfolio? and (low()discrepancy()deterministic()sequence?)

Your SELECT statement is:

s portfolio? and (low()discrepancy()deterministic()sequence?)

Items	File
Examined	50 files
Examined	100 files
Examined	150 files
Examined	200 files
Examined	250 files
Examined	300 files

No files have one or more items; file list includes 342 files.